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ABSTRACT

The study finds that North Carolina is only partly prepared to take maximum advantage of the knowledge explosion which is taking place in the United States. Although the state has a great many libraries, and some very eminent ones, its library resources are still largely unrelated in a systematic way, thus making it impossible for the information needs of the citizens of North Carolina to be met adequately. The study recommends recognition of the North Carolina Library Services Network and its expansion to link all information sources in the state with potential users anywhere in the state, thus finally achieving a coordinate state wide library service system. (Author/MF)

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THE NEXT STEP FOR NORTH CAROLINA LIBRARIES: A LIBRARIES SERVICES NETWORK

The

Report

Of

A Feasibility Study Of

The North Carolina Libraries Services Network

Sponsored By

NORTH CAROLINA STATE LIBRARY

NORTH CAROLINA LIBRARY ASSOCIATION

STATE BOARD OF EDUCATION

STATE BOARD OF HIGHER EDUCATION

RICHARD H. LEACH, *Study Director*

Duke University

Raleigh

January 1971

This Study was made possible by a grant from the Council on Library Resources, Inc., of Washington, D. C. and funds from the North Carolina State Library.

LI 002 788

NORTH CAROLINA

STATE BOARD OF HIGHER EDUCATION

1307 GLENWOOD AVENUE (ROOM 162)

P. O. BOX 10887

RALEIGH, 27605

January 22, 1971

To Chairmen of Co-Sponsoring Organizations:

The Honorable Robert W. Scott, Governor of North Carolina, and Chairman, State Board of Higher Education
Miss Eunice Query, President, North Carolina Library Association
Mr. Paul S. Ballance, Acting Chairman, North Carolina State Library Board
Mr. W. Dallas Herring, Chairman, State Board of Education

Gentlemen:

The Study of the Feasibility of a Libraries Services Network for North Carolina was launched in May, 1969, when the undersigned executive committee composed of your representatives was named to conduct the study.

We are pleased to transmit to you the report of that study, entitled *The Next Step for North Carolina Libraries: A Libraries Services Network.*

We acknowledge the valuable assistance of many who have participated in the study. We are especially indebted to Dr. Leach and to that group of citizens who served as an advisory committee at various stages of the study. Their names are listed in Appendix A. Over 200 other librarians, educators, trustees, and interested citizens were also involved in numerous ways.

We were fortunate in securing the services of three distinguished library consultants, whose report to us provided the study director with the working basis for this Report: Roger McDonough, director, New Jersey State Library; John Humphry, assistant commissioner for libraries, New York Department of Education; and John Dawson, director of libraries, University of Delaware. Their findings were most encouraging. Their conclusion was that the time was ripe for the extension of interlibrary services to all users through the establishment of the North Carolina Libraries Services Network.

The Study has been made possible by a grant of $10,000 from the Council on Library Resources, Incorporated, to whom we owe sincere gratitude. An additional $5,000 from federal funds under the Library Services and Construction Act was allotted to the Study by the State Library.

We believe that this report documents the sound progress North Carolina libraries have made and that it will provide the basis for a very significant next step in the expansion of library services in the state.

Respectfully submitted,

Executive Committee to the Study
Richard H. Leach, *Director* (Duke University)
Hilda A. Highfill, *Secretary* (State Board of Higher Education)
Charlesanna Fox (North Carolina Library Association)
Frank R. Justice (Assistant Budget Officer, State of North Carolina)
Vera Melton (Department of Community Colleges, State Board of Education)
Philip S. Ogilvie (State Librarian, North Carolina State Library)
Jerrold Orne (University Librarian, University of North Carolina at Chapel Hill)
Elaine von Oesen (Assistant State Librarian, North Carolina State Library)
Cameron West (Director of Higher Education, State Board of Higher Education)

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I. INTRODUCTION

The knowledge explosion of recent years is a widely recognized phenomenon. Its impact on every phase of American life is obvious, as is the vital and increasingly large role libraries are playing in making the results of that explosion widely available to all segments of American life. As the Governor's Commission on Library Resources reported in 1965, North Carolina is in the midst of "a great cultural, educational, economic, industrial, and social advance. Expanded and enriched library resources of every type are essential to the state's continued progress. New and complex demands are being made on public, university, college, school, and special libraries by business and professional leaders, educators, students, scientists, farmers, and general readers." That advance and those demands have accelerated since that report was written. If North Carolina is to meet those demands adequately, its still widely scattered and thinly spread libraries will have to find ways to maximize their contributons.

As the centrality of library service to national development has been realized, the old concept of separate libraries has been abandoned and the concept of library systems adopted instead. In North Carolina, as elsewhere, the library profession sees such systems as the best way of meeting present and future service demands and, at the same time, of avoiding uncoordinated proliferation of institutional structures, unnecessary duplication of books and services, and excessive demands upon the public purse. Librarians understand also that continued economic development depends on the availability of information whenever and wherever it is needed. Today a new industry may be reluctant to locate in a rural county at some distance from the knowledge centers of the state and nation; tomorrow, with its local libraries part of a resource-sharing network, any county can be as near the heart of on-going research and developing knowledge as modern communications techniques employed in a statewide system permit. Librarians are aware, in short, that if the state is to be able to take full advantage of the knowledge explosion, its libraries will have to function together as a system. In this way only can they stay within realistic budgetary limitations, on the one hand, and utilize their combined resources fully to meet the rising level of service required, on the other. This report recommends a way of maximizing the provision of library service in North Carolina through a North Carolina Libraries Services Network.

II. A STRONG FOUNDATION

Fortunately, North Carolina has been library-conscious for many years. Its State Library was established in 1812, and over the years, a number of academic and private libraries joined it in serving the government and students of North Carolina. The first publicly supported library, located in Durham, was opened in 1897.* In 1904, the North Carolina Library Association was established, one of its chief purposes being the promotion of library development in the state. An early project culminated in success in 1909 with the creation by the General Assembly of the North Carolina Library Commission. Its statutory mission was to encourage the establishment of new libraries, to work to increase the effectiveness of existing libraries, and to serve as a central information office for library development and service generally in North Carolina. It was a pioneer among state agencies of this kind. With its assistance, and with that of a citizens' library movement mounted in the 1920's, continuing progress was made.

When state aid was offered to local libraries in 1941, library development in North Carolina spurted ahead. Yet, despite steady growth over the years, only 38 per cent of the people of the state had access to public library service in 1930. By 1947, 92 percent of the people had such access, and there was a public library in all but three of the state's 100 counties. Academic and special libraries grew as well, and the 1950's saw the statutory redefinition of the role of the State Library and its merger with the Library Commission in order to provide better leadership in library development across the state.

*As early as about 1700 Bath had a "free public library."

In 1964, Governor Terry Sanford appointed a Commission on Library Resources to study and report on the present and future library needs of the state and its citizens and to make recommendations on how to meet them fully. The Commission studied all major types of libraries in the state and came up with a comprehensive set of recommendations, which subsequent General Assemblies began to implement. In 1967, concerned about the financial implication of library development, the General Assembly created The Legislative Commission To Study Library Support In The State Of North Carolina. That Commission reported in 1968. Its major conclusion was that, because of insufficient funding, the majority of the state's public libraries were still inadequately housed, staffed, and stocked to meet the ever-increasing demands upon them for modern library service. It therefore recommended that the General Assembly affirm the principle that all citizens of North Carolina should have adequate modern library services and that it demonstrate its acceptance of the principle in fact by recognizing the state's responsibility to share with local governments the costs of providing such library services. The 1969 General Assembly increased state aid to county and regional libraries by $1.5 million, appropriated a $4 million special library enrichment fund for the state's sixteen public senior colleges and universities, and doubled the annual book budget of the State Library. As a result, by 1970 North Carolina was well on the way toward becoming a leader among the states in library development.

As libraries in the state grew in number and strength, cooperation among them became an important aspect of their development. Indeed, North Carolina was one of the first states to implement in a broad and effective way the idea of cooperation as the vehicle for developing and strengthening the state's library recources. While progress has been slow at times, a sound foundation has been laid. By 1970, a survey revealed that, over and above a multitude of regional libraries, more than forty cooperative library programs were operating in the state, ranging from those involving library development and the use of library materials to those focused on acquisitions, equipment, and binding. Types of cooperation included the compilation of bibliographic tools and catalogs, the submission of joint grant proposals, and the development of specialized acquisition areas to avoid unnecessary duplication. By 1970, indeed, cooperation had become the expected *modus operandi* of North Carolina librarians.

The oldest example of formal interlibrary cooperation in North Carolina is the North Carolina Union Catalog, which today receives entries from most of the major academic, public, and special libraries throughout the state, thus providing in a single location a means of identifying library materials in any of the contributing libraries. It was set up in the early 1930's by the University of North Carolina at Chapel Hill in cooperation with Duke University and maintained from then until 1969 as a university service to the State. Between 1968 and 1970, the Union Catalog was updated and expanded through an allocation by the State Library of $57,899 from Library Services and Construction Act Title III funds (see Table I) for staff and for improved communications facilities. The State Library's holdings were included at the same time, thereby adding 15,000 titles to the Catalog. The major need now is to make the Catalog comprehensive by including all significant library holdings, wherever they may be found in North Carolina.

The libraries of the University of North Carolina at Chapel Hill and Duke University have cooperated closely since 1933 in joint research, central acquisitions, and the development of specialized collections. Agreements reached between these two libraries in the early years have made possible the daily delivery of library materials to each other; recently the service has been expanded to include other college, university, and special libraries in the Research Triangle area of Durham, Raleigh, and Chapel Hill. Other cooperative combinations have been developed among all types of libraries, notably in the Raleigh area, in the Central Piedmont around Winston-Salem, in the greater Charlotte area, and in Western North Carolina around Asheville.

From the beginning of state aid to libraries, interlibrary cooperation has been prominent. Thus state aid went to regional libraries and joint library boards and supported joint purchasing and sharing of staff from the first.

In 1950, the North Carolina Library Commission instituted a formal arrangement with a group of public libraries for the development of special collections of material in specific subject matter

fields. To supplement the meager resources of the Commission, a system of interlibrary loan collections in public libraries enriched materials readily available to users everywhere in North Carolina. In June 1959, a manual of interlibrary loan procedures was developed and circulated by the Commission.

In 1957, the North Carolina Library Association established a Cooperative Library Resources Committee to recommend ways of expanding interlibrary cooperation. The Committee was instrumental in bringing about the establishment of the Interlibrary Service Center at the University of North Carolina at Chapel Hill the same year. That center linked the libraries of the University of North Carolina at Chapel Hill, North Carolina State College in Raleigh, the Woman's College of the University of North Carolina in Greensboro, and Duke University in an endeavor to make the Union Catalog more comprehensive, to extend interlibrary loan services, and generally to provide bibliographic services more effectively and more economically. Teletype connections were shortly established between the Center and the State Library and subsequently with other libraries.

Other examples of interlibrary cooperation that have come into use in North Carolina in recent years are the central processing center for the colleges and technical institutes in the State's Community College System; the North Carolina Public Libraries Adult Film Project and the processing of purchases for approximately 70 public libraries by the State Library; the formation of regional groupings of academic and public libraries to provide needed services; the manufacture of catalog cards on a contract basis for a number of major libraries by the Library of the University of North Carolina at Chapel Hill; the publication of the North Carolina Union Checklist of Scientific Serials and the formation of the Medical Library Extension Service, the latter linking the four major medical libraries in North Carolina and other libraries through the State Library in a service network to supply practicing physicians with bibliographic or reference material upon request; the cooperative reclassification of holdings; and the sharing of facilities and equipment.

In the 1960's, as demands on libraries began to mount more rapidly and the need to act jointly if those demands were to be met at all adequately came to be widely acknowledged, Elizabeth H. Hughey, the former State Librarian, with the support of the State Board, began to accelerate the development of the State Library as a service agency for other libraries, i.e., a coordinating library making its own resources available to all other types of libraries and seeking ways for the more effective sharing of their separate resources in the interest of improving library service to all North Carolinians. A major step in that direction was the promotion of, cooperation in, and support for ($30,000 from the State Library) the 1964 Governor's Commission on Library Resources. The report of that commission, *Resources of North Carolina Libraries*, edited by Robert B. Downs and published in January, 1965, among other things, identified numerous goals to be pursued by the State Library in behalf of total library service for all North Carolinians.

Mrs. Hughey, and her successor as State Librarian, Philip Ogilvie, and the Assistant State Librarian, Elaine von Oesen, with the support of the Library Board, initiated and carried on numerous actions to attain those goals. Between 1965 and 1970, in addition to the suport extended to the North Carolina Interlibrary Center and the Union Catalog, the State Library became closely correlated in research activities with the Legislative Study Commission on Library Support, the Planning Division of the State Department of Administration, the State Board of Higher Education, and the Institute for Research in the Social Sciences at the University of North Carolina at Chapel Hill. In 1966, the State Library submitted an approved State Plan and began to receive North Carolina's allocation under Title III of the Library Services and Construction Act, which had been passed by Congress in 1965 in consequence of the Federal government's recognition of the importance of cooperative activities in the full utilization of the nations' library resources. Those funds have been received annually since and have been devoted to the cooperative activities listed in Table I. A five-year extension of the Library Services and Construction Act was recently passed by the 91st Congress. The State Library regards the Network here being discussed as a major element of the State Plan under that Act.

One of the first activities under the Title III program was a Conference on Interlibrary Cooperation held in Durham, on June 6-7, 1967. It brought together from different types of libraries in the state librarians who sought to identify their research, service, and communication needs and to establish long-range goals and interim steps to enable them to fill those needs jointly. They also considered needed changes in interlibrary loan arrangements in the state.

Subsequently, the primary concern of the State Library centered around plans which would build upon the enthusiasm generated at that conference and convert the conclusions reached into workable programs. A Title III Advisory Committee was established. It brought a set of recommendations before the Library Board at its November 10, 1967, meeting. The Board approved an interlibrary cooperation program based on those recommendations. The major recommendation called for the installation and maintenance of Inward Wide Area Telephone Service (In-WATS), which had just become available in the Raleigh area, and automatic message instruments (teletypewriter exchange—TWX) between the Reference Services Division of the State Library and the libraries of the University of North Carolina at Chapel Hill, North Carolina State University and Duke University, thus accelerating even more the availability of interlibrary loans and bibliographic services to the libraries of North Carolina. That linkage, which was established and went into operation in February 1968, has been used heavily since, as Table II illustrates. Since its beginning, the number of libraries has increased until currently 149 libraries representing all types are included in the communications network (see Appendix B). The use of the In-WATS reference service has had the effect of increasing the collection and staff in each of the participating libraries. Calls seeking information on any subject for persons in any occupation are received and answered by State Library staff at no cost to local libraries. Inquiries beyond the scope of the State Library resources are referred by teletype to other libraries for response. This means that the smallest participating library in North Carolina has quick access to resources many times greater than those available in even the largest single library in the state.

The Title III Advisory Committee further recommended that 1) the North Carolina Union Catalog be re-evaluated in the light of the current needs of the state so as to make it a more efficient tool by adding entries from community colleges and technical institutes and other libraries when their collections had special emphases; 2) the possibilities of adding additional interlibrary loan services be explored, including the lending of dissertations, theses, and fiction; and 3) a systematic public relations program be established to inform the general public of the services available to them through their libraries. These suggestions remain on the agenda of the State Library and are priority items for the network development here being proposed.

On February 8, 1968, the State Library Board took an even longer step toward the fulfillment of the concept of a library system by making the North Carolina Interlibrary Service Center a joint function of the State Library and the three major resource libraries in the state. From that date, the constituent parts of the enlarged Service Center have been the existing Interlibrary Service Center at the University of North Carolina at Chapel Hill, a new service center at the State Library, and the libraries of Duke University and North Carolina State University, now joined together by an extensive communications system which provides bibliographic and subject reference services to users throughout the state. The participants in the Center agreed that, as soon as funds permitted, an expansion of its services would be undertaken. In its "B" Budget request for the 1969-71 biennium, the State Library noted that it was the state agency primarily responsible for the continued development and effectiveness of interlibrary cooperation in North Carolina and in that request gave priority to a request for funds to permit the addition of staff and equipment to assist with the In-WATS service, to strengthen the Interlibrary Loan Service, and to permit the librarian and assistant librarian to travel to meetings having implications for the systematic development of interlibrary cooperation in the state.

About the same time, the State Board of Higher Education was engaged in a long-range planning study to provide a base of information on which future public-policy decisions affecting higher education in the state might be made. The findings of that study were published in 1968 under the title, *Planning for Higher Education in North Carolina.* Among the areas of study were the

TABLE I

EXPENDITURE OF FUNDS UNDER TITLE III OF THE LIBRARY SERVICES AND CONSTRUCTION ACT IN NORTH CAROLINA, 1967-70

	1967-68	1968-69	1969-70	Program Totals
North Carolina State Library Interlibrary Service (Includes teletype service for the State Library, University of North Carolina at Chapel Hill, and Duke University)	$ 6,226	$11,381	$11,474	$29,081
UNC Interlibrary Service Center, Chapel Hill (Union Catalog Improvement)	19,380	15,095	23,424	57,899
Board of Higher Education (Feasibility Study of Joint Library Service)	———	5,000	———	5,000
TOTAL	$25,606	$31,476	$34,898	$91,980

TABLE II

THE INTERLIBRARY SERVICES RENDERED BY NORTH CAROLINA STATE LIBRARY, MARCH 1969 - OCTOBER 1970

	Interlibrary Loans			TWX Location	In-WATS	Source of Requests For All Services*				
	Requests	Titles	Referrals	Requested	Calls	CC/TI**	Col.**+	HS**	SL**	PL**
Mar.	723	966	262	517	618	19	23	3	45	1,328
Apr.	545	920	190	473	613	34	44	—	19	1,061
May	456	735	181	347	543	12	36	—	15	936
June	487	758	280	414	577	12	35	2	31	984
July	600	820	327	462	636	8	41	—	24	1,163
Aug.	532	764	309	343	559	4	28	—	24	1,035
Sept.	535	944	316	445	775	19	45	—	9	1,227
Oct.	577	981	400	588	790	30	68	—	30	1,239
Nov.	508	874	262	393	673	12	68	—	23	1,078
Dec.	444	822	206	325	586	20	47	—	31	932
Jan.	832	1,149	379	541	759	29	70	39	39	1,414
Feb.	782	1,078	339	559	794	35	86	1	47	1,407
Mar.	717	1,287	404	597	807	37	68	—	24	1,395
Apr.	665	1,218	339	617	814	32	90	2	25	1,330
May	513	775	244	417	603	17	49	—	40	1,010
June	588	714	308	500	624	10	42	—	35	1,125
July	539	814	286	439	630	13	47	—	29	1,080
Aug.	473	683	223	316	571	14	34	—	18	978
Sept.	501	827	273	405	680	19	37	—	28	1,097
Oct.	682	1,023	381	581	732	27	79	20	27	1,261
Total	11,689	18,152	5,909	9,279	13,384	403	1,037	67	563	23,080

* Mail requests included

**CC/TI Community College, Technical Institute

**Col. College or University

**HS High School

**SL Special Library

**PL Public Library

\+ Most frequent users: Davidson College, North Carolina Central University, North Carolina Wesleyan College, Pfeiffer College, Queens College, St. Andrews College.

libraries of the state's colleges and universities. The study found that "the libraries in most of the colleges and universities in North Carolina suffer(ed) from severe deficiencies in holdings . . . ," that costs were rising very rapidly, that a new—and expensive—library technology which was developing might well revolutionize traditional library practices, and that greater use might be made of the resources of many academic libraries. The study concluded that it was not necessary for each college or university library in North Carolina to attempt to solve those problems alone. Rather, it pointed to the tradition of interlibrary cooperation already developed in the state and suggested that it be further developed. The most favorable opportunities for joint action among academic libraries, it appeared, were in specialized subjects and materials for which there was little demand. "A statewide depository collection, separate from any existing library but working with and shared by all institutions, might well be established close to the state's major library resources," the report declared. "In addition, bibliographic services could be provided in the form of a revision and expansion of the North Carolina Union Catalog, through teletypewriter connections among the libraries, and through rapid delivery service from the central facility and from campus to campus. Under this plan the entire library research facilities of the state would eventually be united to serve all students, scholars, and general researchers" in the state (pp. 169-70).

III. A FEASIBILITY STUDY

Among the recommendations of the 1968 report of the State Board of Higher Education was thus the suggestion that "a study be initiated as soon as possible to determine the feasibility of a central research library facility to serve the entire state." It is the report on this study, which has been carried out through the efforts of hundreds of people, that you are reading.

As a result of subsequent discussions, and recognizing the cooperative tide already running in North Carolina, the scope of the investigation was broadened to include ways to link *all* types of libraries—university and college, public, special and private, libraries at secondary schools and public schools, community colleges, junior colleges and technical institutes—and to broaden the range of functions such a facility might perform. A proposal outlining such a study as a joint project was submitted to the North Carolina Library Association, the State Board of Education, the State Library, and the State Board of Higher Education. All gave quick approval to the study proposal. Funds to execute the study were sought from the Council on Library Resources, Inc., an independent, non-profit foundation in Washington, D. C. Through grants of $10,000 from the Council and $5,000 from Library Services and Construction Act Title III funds through the North Carolina State Library, the study got underway in May 1969.

It was agreed at the outset that the study should make use of highly qualified library consultants, whose findings would help form the basis from which the project might move forward. Three nationally distinguished librarians were employed—John Dawson, Director of Libraries, the University of Delaware, representing academic and special library interests; Roger McDonough, Director, New Jersey State Library, representing state libraries and library services; and John Humphry, Assistant Commissioner for Libraries, New York Department of Education, representing public libraries.

In the fall of 1969, in preparation for the consultants' visits to the state, and in recognition of the need for the early involvement of those who would eventually implement any proposed plan of action, a questionnarie was developed and distributed to a total of 154 librarians in all types of libraries across the state. A 66 per cent response was received. Subsequently, the consultants met with representative librarians from over the state, thus hearing the point of view of every library interest in North Carolina. Two months later the consultants again visited the state and made contact with as many library interests as possible. In all, they held discussions with over 200 librarians and library board members in North Carolina. Their conclusion was that the time was ripe for the extension of the interlibrary services to all users throughout the state through the establishment of the North Carolina Libraries Services Network.

Such a network, the consultants pointed out, would make the informational resources of the entire state available on a shared basis. Instead of being hampered by the limited coverage provided by the existing arrangements, the Network would link *all* the significant information resources and services in the state, wherever they might be found, with users anywhere in the state, bringing them all together to serve better and more economically the needs of the citizens of North Carolina. The increased access to knowledge thus made possible would be useful to the state in many ways, but particularly to faculty and students at educational institutions, to those involved in developing the state's economy, and to others with specific individual or community concerns.

Some of the functions of the Network, of course, have been performed in one way or another for many years, some of them for a generation or more. And many are being performed now. Thus the need is not to "create" the Network, but to recognize its existence formally, expand it, and make it central to the operation of both the State Library and the major resource libraries of the state.

With the basis for the Network already present in the expanded North Carolina Interlibrary Service Center, it was easy to establish the Network formally. The State Library Board, at its meeting of August 13, 1970, accepted both the concept of the North Carolina Libraries Services Network and the logic of supporting it from state funds, to the extent of declaring it a matter of first priority in its "B" Budget for the 1971-73 biennium. The biennial request of $273,030 for the State Library's portion of the support of the Network is detailed in Item 1.a. of Table III. Staff and services which would be supportive of the Network are requested in Item 1.b., c., and d.

The North Carolina Library Association by resolution of its Executive Committee on July 31, 1970, similarly accepted the Network concept and encouraged "all librarians in the state to support the goals of the Network and to participate in the plans for the expansion of statewide services to libraries through the Network." Although neither the State Board of Education nor the State Board of Higher Education has taken formal action on the Network as it has been developed, representatives of both have continued to participate in all the discussions and their continued support is anticipated. Thus the Network in its expanded form can be said to be the logical capstone to more than forty years of cooperative activity among North Carolina libraries.

The problem is thus not how to establish the Network. It is in operation. The problem is how to develop it further. The goal is a comprehensive library network, not only linking resources with users throughout the state, but also giving leadership to the planning and coordination of library development statewide.

IV. RECOMMENDATIONS

The following recommendations are made to accomplish that purpose:

1. Since the Network will be primarily a state service function, *it is recommended* that the 1971 General Assembly recognize the North Carolina Libraries Services Network as an important state function and declare its development to be a state priority.

2. Furthermore, because the Network represents an expansion of the cooperative programs already undertaken by the North Carolina State Library and the major resource libraries of the state, it must be developed with appropriate representation from additional library interests. Thus, *it is recommended* that the Network be administered, at least initially, by the North Carolina State Library, advised for that purpose by a Network Advisory Committee of 14 persons.

   The Committee shall be representative of all the major areas of library interest in the state—public, university, college, school, and special. To that end, *five* members of the

TABLE III

STATE LIBRARY 1971-73 "B" BUDGET REQUEST

PRIORITY ITEM I

Description	Requested 1971-72	Requested 1972-73	Biennial Totals
a. (To provide funds for a North Carolina Libraries Service Network to link existing informational services in libraries with with users throughout the State)			
Salaries—Staff 1 Librarian II @ 8,028 1 Library Assistant II @ 5,088 1 Library Assistant I @ 4,656 1 Typist I @ 4,080	$ 21,852	$ 21,852	
State Contribution for Retirement and Social Security-Appropriation	3,093	3,142	
Communications	29,200	29,200	
Travel	4,000	4,000	
Printing	1,000	1,000	
General Expense	10,000	10,000	
Contractual Services	66,080	68,611	
Sub-Total	135,225	137,805	$273,030
b. (To provide assistance in Documents Services)			
Salaries—Staff 2 Library Assistant II @ 5,088 1 Clerk I @ 3,756	13,932	13,932	
State Contribution for Retirement and Social Security-Appropriation	1,972	2,003	
Equipment	825	—	
Sub-Total	16,729	15,935	$ 32,664
c. (To provide assistance in Reference Services)			
Salaries—Staff 2 Typists II @ 4,656 1 Clerk II @ 4,452	13,764	13,764	
State Contribution for Retirement and Social Security-Appropriation	1,948	1,979	
Equipment	1,430	—	
Sub-Total	17,142	15,743	$ 32,885
d. (Funds for additional supplies, communications and equipment in Reference Services)			
Supplies	100	100	
Communications	550	550	
General Expense	50	50	
Equipment	1,604	1,560	
Sub-Total	2,304	2,260	$ 4,564
TOTAL	$171,400	$171,743	$343,143

Committee shall be named by the State Librarian upon nominations as follows: one representative of the public libraries by the North Carolina Library Association; one representative of the public universities by the State Board of Higher Education; one representative of the public schools and community college system by the State Board of Education; one representative of the special libraries by the North Carolina Special Library Association; and one representative of the private colleges and universities by the North Carolina Association of Independent Colleges and Universities. *Three* members to represent statewide library interests shall be named by the State Librarian on his own nomination. *Three* members of the Committee will serve *ex officio* in their capacities as university librarian at the major resource libraries in the state: North Carolina State University, the University of North Carolina at Chapel Hill, and Duke University. *Three* members shall be named by the Governor of North Carolina, one to represent the citizens at large, one to represent local government, and one to represent state government. The appointments shall be made biennially, and the initial Committee should be named as early as possible in 1971.

3. The Network's activities should be coordinated by a director. *It is recommended* that a director be employed to serve, for the initial period of operation at least, as a member of the staff of the North Carolina State Library. The State Librarian should make the appointment with the concurrence of the Network Advisory Committee. The director will be directly responsible to the State Librarian (see Figure 1). The position of director should be classified by the Personnel Department and necessary salary funds for 1971-73 should be added to the "B" Budget request.

4. The director will be responsible for continuing existing cooperative relationships, exploring current and prospective needs for any type of information service in North Carolina, and recommending and promoting additional programs to meet the needs identified. Thus, *it is recommended* that his first priorities be to

   a. arrange meetings between appropriate North Carolina Library Association committees and the UNC-Chapel Hill library administration in order to plan for the more comprehensive development of the N. C. Union Catalog, long recognized as required; (The participation of all potential contributors should be sought; the Catalog's functions should be redirected toward the objectives of the Network; the objective of the Catalog should be the eventual availability in one location of all bibliographic resources in the state; a change in the location of the Catalog should be considered only after experience with the operation of the expanded Catalog in its present location.)

   b. initiate discussions to ascertain the several levels of information needed in the state and begin to evolve appropriate ways to meet the service needs of each level; (He should begin to work with public school officials, community colleges, technical institutes, private educational institutions, and proprietors of special libraries to find ways to include the resources of such libraries in the Network.)

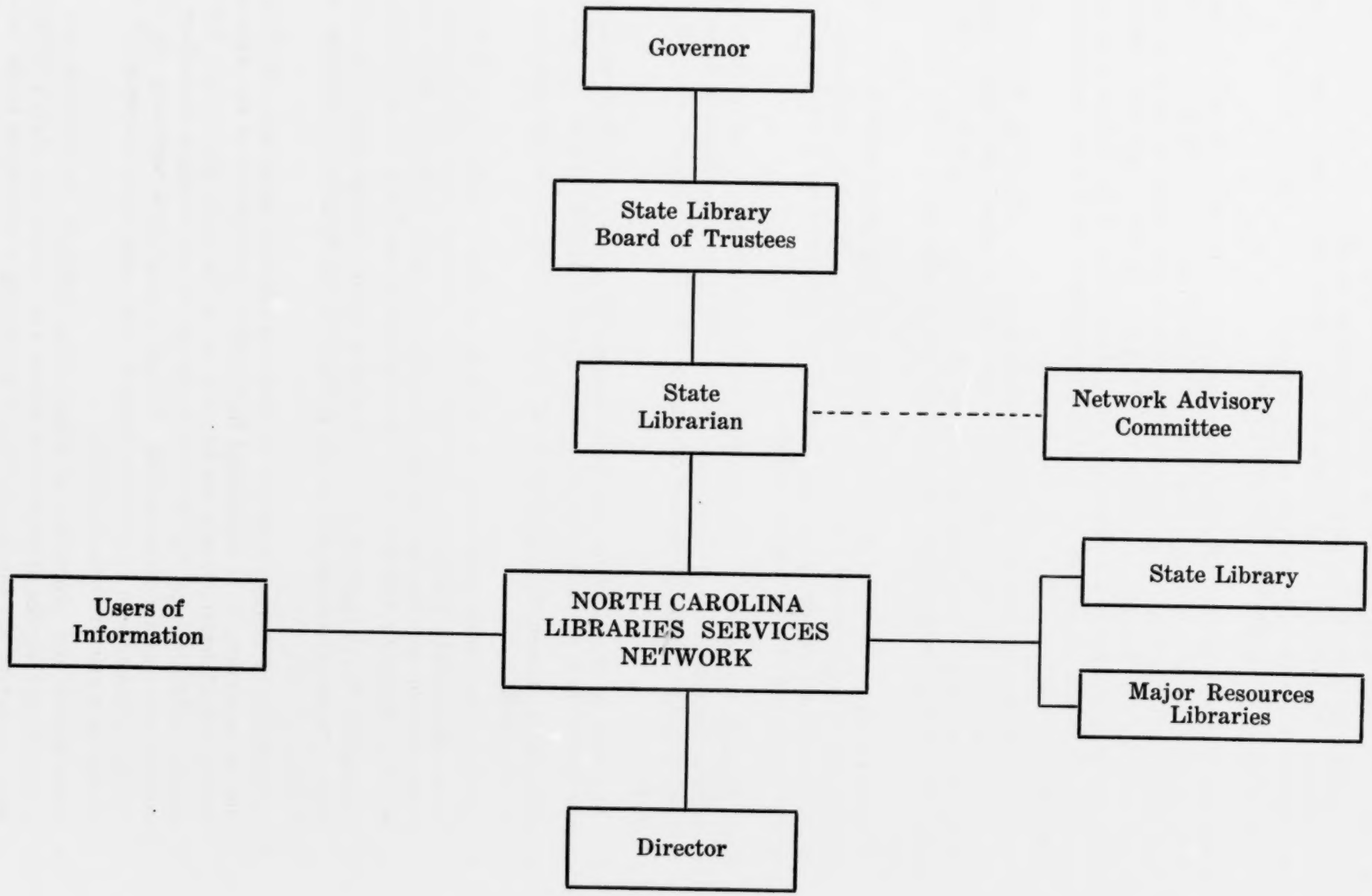
   c. initiate discussions with the North Carolina Board of Science and Technology to devise ways to tie its capabilities into the Network so as to make its experience in data processing and information search and retrieval more widely available;

   d. develop a schedule for the development of the Network's functions to serve as a guide in Network planning; (The schedule should include all desirable elements of the Network's full program, with specified dates in chronological sequence for operational status.)

   e. take immediate steps to publicize the establishment and availability of the Network and the functions it will perform for the state and its citizens. (Such publicity should cover both the services presently available and those anticipated at a later date.)

Figure 1

NORTH CAROLINA LIBRARIES SERVICES NETWORK ORGANANIZATION



ERIC 15

5. A method of financing the Network must be established. *It is recommended* that the State of North Carolina bear the major share of the Network's cost, thus recognizing it as a state function and acknowledging the contributions the Network will make to overall state development. In particular, *it is recommended* that the 1971 General Assembly appropriate as a minimum for the development of the Network the full amount requested in Item 1.a. of the 1971-73 "B" Budget of the State Library.

6. Since the Network will serve other state agencies and private users as well, some portion of its cost should be borne by contributions from those users. Thus, *it is recommended* that the State Librarian and the Network Advisory Committee work with participating state libraries and agencies, including the libraries of state-supported universities, colleges, and technical institutes, regarding a fair proportion of the Network's expenses to be borne by them and a means of paying that proportion of their state appropriations to the Network's account.

   It is further recommended that the proportion of the costs of the Network to be borne by private participants be worked out on the basis of experience. Membership fees and contracts for services are possible methods of funding. One pattern already established is the provision of services upon request in return for the use of In-WATS and TWX service.

   It is further recommended that the possibilities of funding other than by state appropriation and reimbursement for services be explored, including application for federal funds, foundation grants, gifts, and loans. The director of the Network will be responsible for preparing the Network's budget.

7. Since demands for service in the Network will be particularly heavy on the major resource libraries of the state, *it is recommended* that methods of compensating those libraries be included in budget planning, as they are in the 1971-73 "B" Budget requests of the State Library.

8. The functions of the Network will be developed by experience and in response to demonstrated needs. *It is recommended,* however, that they include at least the following:

   a. planning to assure the inclusion of all useful informational resources in the state in the Network;

   b. providing the widest possible access to those resources, either directly or by reference to an appropriate source of assistance. The Network may utilize communication or transportation services beyond the presently employed In-WATS, TWX, mail and truck services, including Out-WATS service and additional TWX access stations;

   c. making the North Carolina Union Catalog as useful a tool as possible in accordance with earlier recommendations and as the product of the director's discussions as suggested in 4a;

   d. development of storage facilities for little-used library materials; (Although this function is important, it is recognized that further development of the Network is needed before a final determination can be made as to the most appropriate facility requirements. In the interim, the Network could call on any available depository space in the state to serve as a storage facility. Tentative judgments regarding the design of the facility ultimately to be provided suggest that maximum economy of storge space should be a primary consideration.)

   e. investigation and promotion of relationships between the Network and existing regional library service arrangements within and beyond the state's borders; (Particularly important are the possibilities of developing relationships in the following areas: collection building; acquisitions; processing and cataloging; card service; and computer applications to library service, including an informational data bank.)

f. promotion of research in the planning and development of library and Network functions; (The whole area of communications, interinstitutional programming, and automation as it applies to more effective and comprehensive library services and the possible linkage of libraries in business, industry and government are examples of the kinds of research needed.)

g. reporting regularly to the State of North Carolina, the participating libraries and agencies, and the public at large;

h. developing supporting services such as copying facilities.

9. The functions of the Network will be handled through appropriate personnel charged with specific responsibilities under the direction of the Network Director. *It is recommended* that as a general rule the Network's operations be centralized in the State Library, but that those functions and services which can be performed most economically, speedily, and efficiently elsewhere be dispersed among other libraries or agencies in the state. Budgets will therefore be expected to reflect personnel needs at the several locations.

   At a later phase of Network development, a central facility of its own, not in the capital city complex, might prove to be desirable. It is expected that no action be taken in this area until such time as experience and proper planning dictate its propriety.

10. How participants in the Libraries Services Network will cooperate in the performance of their several functions will depend on the needs and resources of the participants and on the ability of each to contribute. *It is recommended* that all parties clearly understand that the development of a statewide Network is not intended to enable individual institutions or agencies to circumvent their responsibilities to establish, maintain, and support adequately on-site information collections and materials.

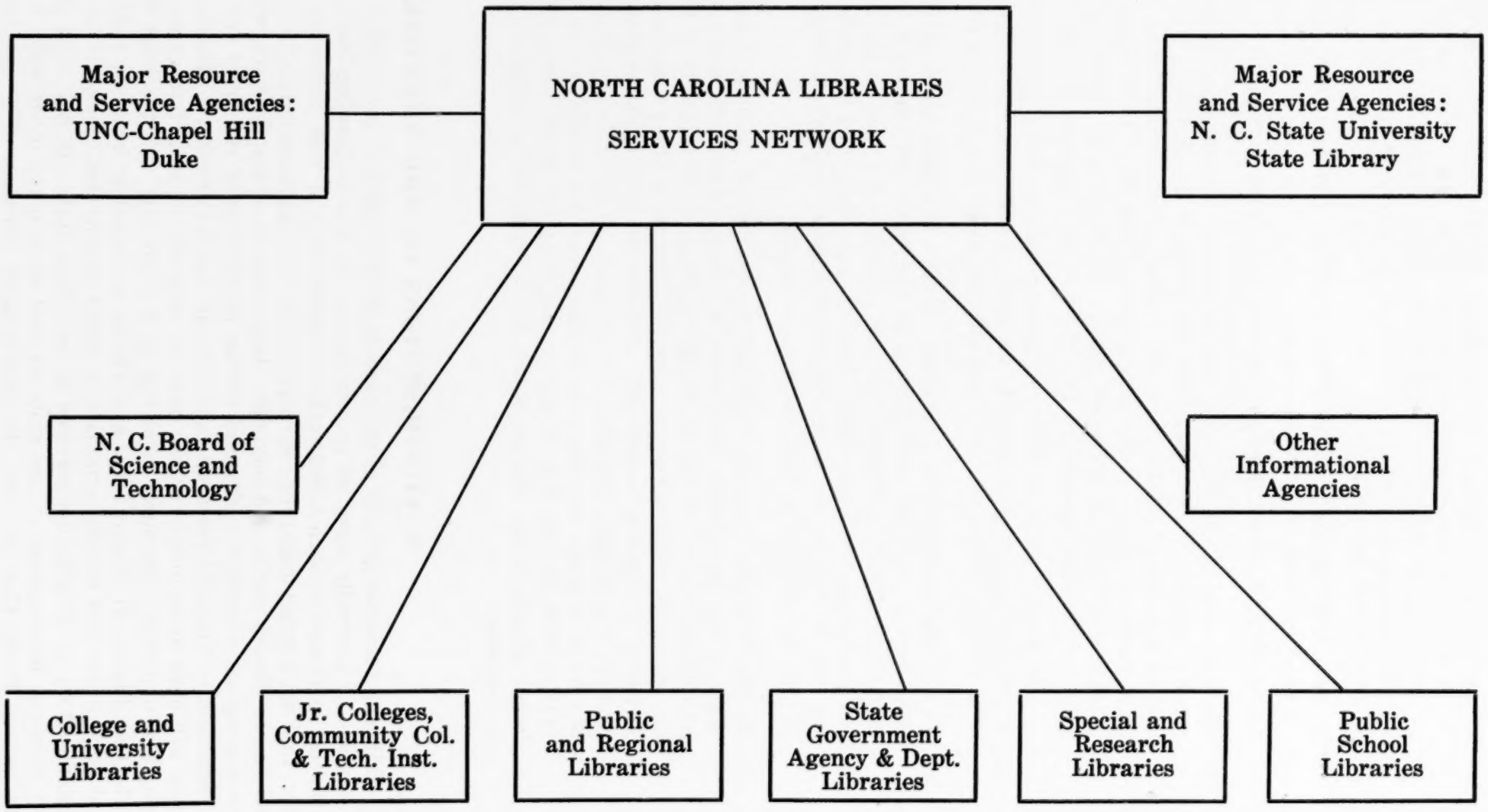
11. As the Network develops, it should be regarded as flexible in both organization and operation, as an experiment, permitting a variety of methods and combinations of methods of improving library service in North Carolina to be tried. *It is thus recommended* that at the end of an initial three-year period of operation, the groups represented on the Network Advisory Committee review and evaluate the Network's program in order to redirect it if it should be thought desirable or necessary. *It is further recommended* that the same type of review be made at regular intervals thereafter, possibly every three years. Such periodic reviews will offer an opportunity to recognize the rapid developments taking place in library science in the United States and to make the adjustments in the network which may be required.

V. CONTRIBUTIONS OF THE NETWORK

Library networks are still in the process of development everywhere in the United States. There are no generally accepted prototypes for the North Carolina Network to follow. Thus specific cost estimates of such a Network are impractical at this juncture; evidence indicates, however, that substantial long-range savings can be anticipated as more effective use is made of present and future library staffs and holdings. Improvement of the Network with its built-in potentiality for sharing can eliminate costly and unwise duplication of resources and can strengthen the total information service and research capability of North Carolina. In the long run, of course, the Network will have to be judged on the basis of its performance. But expansion of such a Network should be undertaken because, involving as it eventually will the total library community of the state (see Figure 2), it can forge a workable partnership between public and private agencies and institutions that should culminate in better coordinated, more efficient, and more effective dissemination of information services to the entire state. It will thus demonstrate its utility in the economic development of the state as well as in many other ways and will provide the basis for linking North Carolina into the still broader network of a nationwide information service which is just over the horizon.

Figure 2

NORTH CAROLINA LIBRARIES SERVICES NETWORK
SERVICE CHART


Major Resource and Service Agencies: UNC-Chapel Hill Duke
NORTH CAROLINA LIBRARIES SERVICES NETWORK
Major Resource and Service Agencies: N. C. State University State Library
N. C. Board of Science and Technology
Other Informational Agencies
College and University Libraries
Jr. Colleges, Community Col. & Tech. Inst. Libraries
Public and Regional Libraries
State Government Agency & Dept. Libraries
Special and Research Libraries
Public School Libraries

APPENDIX A

ADVISORY COMMITTEE ON FEASIBILITY STUDY OF THE NORTH CAROLINA LIBRARIES SERVICES NETWORK

Name	Groups Represented
Mrs. Darlene L. Ball, Manager Technical Services Burlington Industries Research Library Burlington	Special Libraries
Mr. Kenneth Brown, Director of Libraries Asheville and Buncombe County Pack Memorial Library Asheville	Public Libraries
Mr. Peter J. Chenery, Director North Carolina Board of Science and Technology P. O. Box 12235 Research Triangle Park	Research and Industry
Mrs. Mildred S. Councill Librarian, Wayne Community College Goldsboro	Private Junior Colleges
Dr. Grimsley T. Hobbs, President Guilford College Guilford	Small Colleges
Dr. J. Stuart Devlin, Executive Director Association of Eastern North Carolina Colleges and Universities 333 Fayetteville Street Raleigh	Small Colleges
Mrs. Judith Garitano Cor.sultant in Field Services Department of Public Instruction Raleigh	Public School Libraries
Mr. John Henley 116 Lakeshore Drive Hope Mills	General Assembly
Dr. Benjamin E. Powell, Librarian William R. Perkins Library Duke University Durham	Private Colleges
Dr. W. Newton Turner Vice President for Academic Affairs Western Carolina University Cullowhee	Graduate Programs

APPENDIX B

LIBRARIES AUTHORIZED TO USE THE NORTH CAROLINA STATE LIBRARY IN-WATS INFORMATION SERVICE, DECEMBER 31, 1970

Senior College and University Libraries (45)

Public:

North Carolina State University, Raleigh
University of North Carolina at Asheville
University of North Carolina at Chapel Hill
University of North Carolina at Charlotte
University of North Carolina at Greensboro
University of North Carolina at Wilmington

Appalachian State University, Boone
East Carolina University, Greenville
Elizabeth City State University, Elizabeth City
Fayetteville State University, Fayetteville
N. C. Agricultural and Technical State University, Greensboro

North Carolina Central University, Durham
North Carolina School of the Arts, Winston-Salem
Pembroke State University, Pembroke
Western Carolina University, Cullowhee
Winston-Salem State University, Winston-Salem

Private:

Atlantic Christian College, Wilson
Barber-Scotia College, Concord
Belmont Abbey College, Belmont
Bennett College, Greensboro
Campbell College, Buie's Creek
Catawba College, Salisbury
Davidson College, Davidson
Duke University, Durham
Elon College, Elon College
Gardner Webb College, Boiling Springs
Greensboro College, Greensboro
Guilford College, Guilford
High Point College, High Point
Johnson C. Smith University, Charlotte
Lenoir Rhyne College, Hickory
Livingstone College, Salisbury
Mars Hill College, Mars Hill
Meredith College, Raleigh
Methodist College, Fayetteville
North Carolina Wesleyan College, Rocky Mount
Pfeiffer College, Misenheimer
Queens College, Charlotte
Sacred Heart College, Belmont
St. Andrews Presbyterian College, Laurinburg
St. Augustine's College, Raleigh
Salem College, Winston-Salem
Shaw University, Raleigh
Wake Forest University, Winston-Salem
Warren Wilson College, Swannanoa

Public Libraries (91)

Albemarle
*Asheboro
*Asheville
Black Mountain
Boone
*Brevard
*Bryson City
Burgaw
*Burlington
Canton
Carthage
*Charlotte
Clinton
Columbia
Columbus
Concord
*Durham
Eden
Edenton
*Elizabeth City
*Elizabethtown
Elkin
Fayetteville
Forest City
*Gastonia
Goldsboro
*Greensboro
Greenville
Halifax
Henderson
Hendersonville
Hertford
*Hickory
*High Point
Hillsborough
*Jacksonville & Camp Lejeune
Jefferson
*Kenansville
*Kinston
*Laurinburg
Lenoir
Lexington
Lillington
Louisburg
*Lumberton
Manteo
*Marion
*Marshall
*Mocksville
Monroe
Mooresville
*Morganton
Murphy
New Bern
*Newton
North Wilkesboro
Oxford
Plymouth
Raeford
*Raleigh
Roanoke Rapids
*Rockingham
*Rocky Mount
*Roxboro
Rutherfordton
1) Rutherfordton County
2) Norris Public
Salisbury
*Sanford
Shelby
*Smithfield
*Southern Pines
Southport
*Spruce Pine
1) Newland
2) Burnsville
*Statesville
*Tarboro
*Taylorsville
Thomasville
Troy
Wadesboro
Wallace
Warrenton
*Washington
*Waynesville
Whiteville
Williamston
Wilmington
*Wilson
Winston-Salem
*Winton
Yanceyville

88
021

Special Libraries (12)

Regional Education Laboratory for the Carolinas and Virginia
Durham

*Burlington Industries, Inc.
Greensboro

IBM Corporation Dept. 716
Research Triangle Park

Library Division Special Services Section
Fort Bragg

The News & Observer
Raleigh

*Cone Mills Library
Greensboro

National Air Pollution Control Administration
Durham

Ecusta Paper Operations, Div. of Olin
Pisgah Forest

*Bell Telephone Laboratories
Greensboro

Veterans Administration
Durham

Beaunit Textiles
Research Triangle Park

Charlotte Observer & News Library
Charlotte

Technical Institute (1)

Durham Technical Institute Library
Durham

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*Frequent Users

THE NEXT STEP FOR NORTH CAROLINA LIBRARIES: A LIBRARIES SERVICES NETWORK

Summary of the Report of A Feasibility Study of The North Carolina Libraries Services Network

Sponsored By

NORTH CAROLINA STATE LIBRARY

STATE BOARD OF EDUCATION

NORTH CAROLINA LIBRARY ASSOCIATION

STATE BOARD OF HIGHER EDUCATION

RICHARD H. LEACH, *Study Director*
Duke University

NOTE: A detailed Report of the Study is available upon request from the Office of the State Librarian, Raleigh, North Carolina.

Raleigh
January 1971

FINDINGS OF THE STUDY

The Study of the Feasibility of a Libraries Services Network for North Carolina finds that North Carolina is only partially prepared to take maximum advantage of the knowledge explosion which is taking place in the United States. Although the state has a great many libraries, and some very eminent ones, its library resources are still largely unrelated in a systematic way, thus making it impossible for the information needs of the citizens of North Carolina to be met adequately.

Suggestions for Improvement

Over the years, a variety of suggestions have been made to meet those needs more satisfactorily. Dr. Robert B. Downs' 1965 study of North Carolina's library resources and needs recognized "that all libraries — public, school, college, university, state, special — should be viewed as a whole and fitted into a common pattern. Weaknesses in any one of the links is harmful to the rest."

Looking at the rising needs of college libraries in 1968, the State Board of Higher Education saw the possibility of extending academic cooperation.

But the problem of organizing and funding such an extension remained unsolved. The State Library, the State Board of Education, the North Carolina Library Association and the State Board of Higher Education joined together in the search for statewide cooperation through the vehicle of the Feasibility Study here summarized.

North Carolina Has a History of Cooperation

Interlibrary cooperation to link individual libraries for improved services began early in North Carolina. The North Carolina Union Catalog was begun by the University of North Carolina at Chapel Hill and Duke University in the 1930's as a small cooperative project, and public libraries have joined in a number of ways since 1941.

In 1957, the University of North Carolina at Chapel Hill established the Interlibrary Service Center. The availability in 1968 of funds under Title III of the national Library Services and Construction Act strengthened the Service Center immensely. A rapid communications system linking the State Library and the libraries of the University of North Carolina at Chapel Hill, North Carolina State University at Raleigh, and Duke University was set up to supply bibliographic information at no cost to the user to over 100 libraries in the state.

By 1968, the State Library had assumed leadership in the development of a coordinated system of library service for the entire state, and there was ample evidence throughout the state of enthusiastic support of such a system by librarians.

The North Carolina Libraries Services Network came officially into being on August 13, 1970, when the State Library Board accepted the concept of the Network and announced its expansion as first priority in its "B" Budget for the 1971-73 biennium. The problem is thus not to establish the Network, but to develop it further.

RECOMMENDATIONS OF THE STUDY

The Study recommends recognition of the North Carolina Libraries Services Network and its expansion to link all information sources in the state with potential users anywhere in the state, thus finally achieving a coordinated statewide library service system.

To that end, the Study makes the following major recommendations:

— that the 1971 General Assembly declare development of the North Carolina Libraries Services Network to be a state priority

— that the 1971 General Assembly appropriate as a minimum for the development of the Network the full amount requested in Item 1.a of the 1971-73 "B" Budget of the State Library ($273,030)

— that, at least during the initial stage of its development, the Network be considered a function of the State Library and the director of the Network, who should be employed as soon as possible, be considered a member of the State Library staff

— that the director review the status of cooperative activities among libraries in North Carolina and seek ways to continue and extend them to the end that a coordinated statewide library service system become a reality

— that the functions of the Network include at least planning to link together all the useful informational resources in the state; providing the widest possible access to those resources by an imaginative combination of communication and transportation services; making the North Carolina Union Catalog comprehensive in coverage; publicizing the services available from the Network; and conducting studies and research leading to the fullest possible statewide coordination of library services for the benefit of the citizens of North Carolina

— that future funding of the Network include state appropriations directly to the Network and indirectly through agency allocations for services performed by the Network; payment for services rendered by the Network; and Federal funds, foundation grants, gifts and loans

— that at the end of an initial three-year period of operation, the Network's structure and program be reviewed and redirected if necessary to suit changing needs or demands. It further recommends that the same type of review be made every three years thereafter, to permit the rapid developments taking place in library science in the United States to be brought to bear on the Network's activities.

A LIBRARIES SERVICES NETWORK

The Study urges the State to undertake expansion of the Network as an investment in the maximum development of the human and economic resources of North Carolina in the years ahead.

It should be emphasized that the development of a statewide Network is not intended to make it possible for individual institutions or agencies to circumvent their responsibilities to establish, maintain, and support adequately on-site collections and materials.

The Network, at least during the initial period of development, should be regarded as flexible in both organization and operation. as an experiment, permitting a variety of methods and combinations of methods of improving library services in North Carolina to be tried.

The library Network concept is still in the process of development in the United States; thus any estimates of the costs of the North Carolina Network would be of limited value at this time. The Network's eventual contribution to the state will have to be judged on the basis of its performance. But evidence indicates that substantial long-range savings can be anticipated as more effective use is made of present and future library staffs and holdings and as unnecessary duplication of resources and services is eliminated.

* * * * *

This Study was made possible by a grant from the Council on Library Resources, Incorporated, Washington, D. C., and funds from the North Carolina State Library.

In the conduct of the Study and the preparation of the Report, the Director was guided by an Executive Committee representing the sponsors, composed of the following:

Charlesanna Fox, County Librarian, Randolph Public Library, North Carolina Library Association representative
Frank Justice, Assistant Budget Officer, State of North Carolina
Vera Melton, Coordinator of Library Services, Department of Community Colleges
Philip S. Ogilvie, State Librarian
Jerrold Orne, University Librarian, University of North Carolina at Chapel Hill, member State Library Board
Elaine von Oesen, Assistant State Librarian
Cameron West, Director, State Board of Higher Education
Hilda A. Highfill, Research Associate, State Board of Higher Education

Members of the Advisory Committee who assisted at numerous stages of the Study are as follows:

Darlene L. Ball, Manager, Technical Services, Burlington Industries Research Library
Kenneth Brown, Director of Libraries, Asheville and Buncombe County
Peter J. Chenery, Director, North Carolina Board of Science and Technology
Mildred S. Councill, Librarian, Wayne Community College; immediate past president, North Carolina Library Association
J. Stuart Devlin, Executive Director, Association of Eastern North Carolina Colleges and Universities
Judith Garitano, Consultant for Library Services, Department of Public Instruction
John Henley, Senator, North Carolina General Assembly
Grimsley T. Hobbs, President, Guilford College
Benjamin E. Powell, University Librarian, Duke University
W. Newton Turner, Vice President for Academic Affairs, Western Carolina University